**Family Financial Conversations**

**Fill in the Blank HMV**

**Facilitator’s Guide**

The approach to the session is as follows and if you have someone co-facilitating, please share the responsibilities with them. Remember, that **your** enthusiasm is contagious. If you want the participants to get a good deal out of this, be animated and engaged!

1. Introduce the topic by saying something like this: “Thank you for your participation in this new discussion program about the importance of engaging family members in important conversations, starting with financial matters. My name is \_\_\_\_\_\_\_\_\_\_\_\_\_\_, from \_\_\_\_\_\_\_\_\_\_\_\_\_, and I’m actively involved with \_\_\_\_\_\_\_\_\_\_ (HMV, Family Financial Conversations, Financial Planning, etc.) What we are about to participate in is a Fill-in-the–Blank approach to Hearing Men’s Voices. There are a few ground rules. First and foremost is that we respect each other and one another’s privacy. What is said in the room stays in the room. I hope that each of us will feel comfortable speaking freely. Please make sure that your comments reflect your personal experience rather than your opinion about the topic in general or about what others have said.”

“You will be given a sheet to fill out and a pen or pencil will be available in case you don’t have one. In a moment, I’m going to give you 10-15 minutes to fill in the blanks on your answer sheet. You are encouraged to be as honest with your answers as possible and please respond to each item. If in doubt as to how to answer a question, it is usually safe to go with the first thing which comes to mind. If everyone has their sheet and something to write with, we can begin now.”

1. Monitor the room and respond to any questions people may have. Keep track of the time and give warnings at 5 minutes, 2 minutes, and 1 minute to help people pace themselves.
2. Call time after the 10-15 minutes are up and an easy way to start is to take three minutes to ask people about their general impressions and themes they picked up in completing the exercise. You can then take a few minutes to ask for general comments about what people learned about themselves in filling in the blanks.
3. You should then have 30-45 minutes to engage in discussion of the different questions and then ask people how they responded. Since you won’t be able to get through all of them, it may be wise to select 6-10 questions ahead of time which you are most interested in getting people to talk about. In raising a question to discuss, simply ask people to read what they wrote. It is that simple. People may have some additional comments which are fine. It is also OK to call on people to read the response to the question if there are periods of silence. At the end of 3-5 minutes of this, it is valuable to summarize, or ask someone in the audience to summarize what they have heard before moving onto the next question.
4. It is valuable to think of making sure that questions specifically related to the theme you are focusing on get plenty of attention (e.g. talking to children, teens, or aging parents). Each section has questions in common and questions specific to that theme.
5. Nearing the end of the allotted time, you should begin the wrap up. The easiest way to do this is to focus on key pieces of information gained and lessons learned about themselves in the session by asking the participants for their comments on this. It is then helpful for you to make some summary comments about what you learned from the discussion. Again, try to then make some focused comments about the specific theme. As part of this, it would be important to address specific Jewish themes or values raised.